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All Presentations Available in Two Weeks



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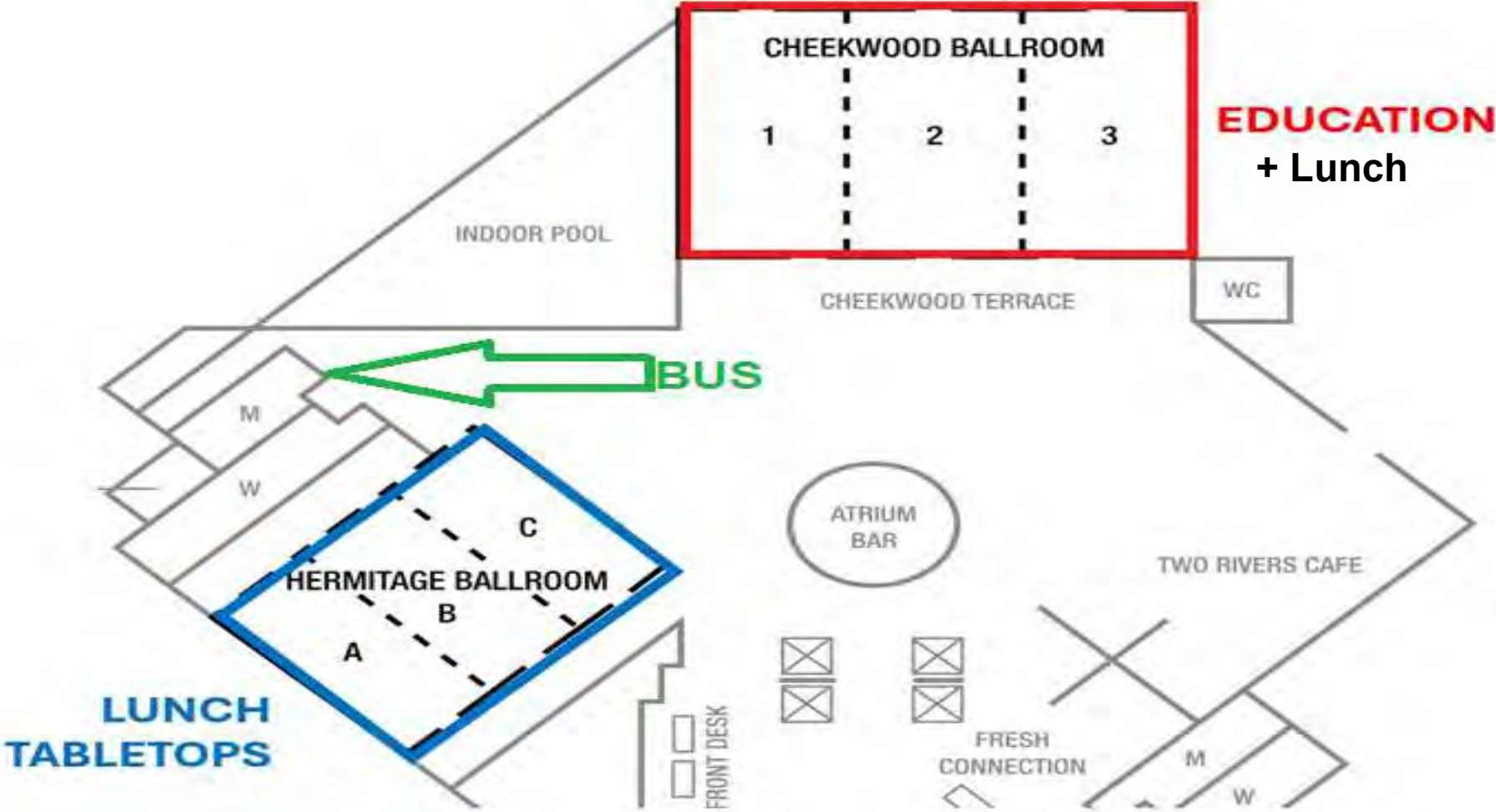
LAWRENCE
EQUIPMENT 
THE EDGE ON AUTOMATION


LALLEMAND
LALLEMAND BAKING

 **ROVEY**
SEED CO.



Meeting Space



Factory Visits

- Factory Transportation: Bus + **Car Pooling**
 - Two 55 Pax Motorcoaches Available (=110 seats, so 35 short)
 - 26% of Surve Respondents Say Driving = 50 Drivers
 - If 10 Drivers take 3 people each everyone has ride (RAISE HANDS)

\$20 Gas Contribution for Carpool Drivers



- **Must** Sign WAIVERS
- Wear Safe Clothing and Shoes
- **Depart Hotel 830 am**





NASHVILLE TN

DAY ONE - Sept 29

	TOPIC	SPEAKERS
8:00-9:00	Badge Pickup & Morning Snack	
8:30-9:00	1 Welcome & Event Overview + Market Update	Jim Kabbani, TIA
9:00-9:30	2 GLP-1 trends in Tortillas	Monica Stewart, Tyson Foods
9:30-10:00	3 Clean Label Solutions that Combat Early Mold Spoilage	Dr Anita Srivastava, Kerry Ingredients
10:00-10:30	4 Exploring Seed Oil & Non-Seed Oil Solutions in Tortillas and Chips	April Allen, BUNGE Oils
10:30-11:00	5 Foldability Challenges for Gluten Free Tortillas	Dr David Ovadia, MOAT Consulting
11:00-11:30	6 Tortilla Troubleshooting - Latest Tips & Techniques	Dr Kirk O'Donnell
11:30-12:00	7 Keeping tortillas Fresh, Enzymatically	Dr Sivakumar Pattathil, Lallemand
12:00-1:00pm	8 "Ask The Experts" Lunch	Panel: Nic, Nico, Monica and Rafael
1:00-1:30	9 Enzyme Strategy in High-Protein, High-Fiber, Reduced-Fat Tortilla	Dr Hojjat Abdollahikhamene, Enzyme Innovation
1:30-2:00	10 Traceability & Preventing Stock-outs	Rafael Perez, La mexicana
2:00-2:30	11 Unlocking the Full Potential of Enzymes in Tortillas- from cost to real value	Nic Franciosi, Peter Asta - IFF
2:30-3:00	12 Managing Impact Of Inflationary Related Changes	Jim Taylor, Tyson Foods Trading
3:00-3:30	13 Corn Cooking optimization	Nico Charalampides, STERN Ingredients
3:30-4:00	14 Adding Color and Flavor to your Tortillas	Matt Buss, Allied Blending
4:00-4:30	15 Latest on Chip Frying	Caleb Reyes, Heat & Control
4:30-5:00	16 Succession Planning Strategies for Family Businesses	Irma Quinones, Prudential
5:00-7:00	Table Top Exhibits & Cocktail Reception	

DAY TWO - Sept 30

	TOPIC	
8:00-8:30	Board Buses to Plants & Depart from Hotel	
8:30-9:00	Drive to La Hacienda	
9:00-10:30	Tour La Hacienda	
10:30-11:30	Drive to JC FORD	
11:30-12:30	Lunch at JC Ford	
12:30-2:30	Small Group Tours of JC Ford	
2:30-3:30	Buses Back to Hotel	

*** All Details Subject To Change ***

Factory Tours

Hotel

2200 Elm Hill Pike, Nashville, TN 37214

20 Min Hacienda

431 Allied Drive, Nashville TN 37211

51 Min JC Ford

2007 Oakland Pkwy, Columbia, TN 38401

59 Min Hotel

2200 Elm Hill Pike, Nashville, TN 37214



MAP FOR DRIVERS – Found In Program Booklet



Tortilla Market Worldwide

By Jim Kabbani, CEO

Tortilla Industry Association

Presented by Nicolas Charalampidis

Head of R&D – Baking and Laboratory

TIA Education Committee

DEUTSCHEBACK

At IBIE 2025





Source: United States Department of Agriculture (USDA), Food and Agriculture Organization of the United Nations (FAO), African Union (AU) - Department of Rural Economy and Agriculture, Latin American Economic System), Tortilla Industry Association (TIA), International Association of Culinary Professionals (IACP), International Foodservice Distributors Association (IFDA), Institute of Food Technologists (IFT), MRFR Analysis, Companies Annual Report and Others

Multiple Data Sources Collected, Aggregated & Integrated



Comparative Methodology

The tortilla market data publicly found is based on **bar-code scan captures only**

- Less than one third of tortillas are sold through chain retailers
- Large portion of tortillas part of other product so not recorded as tortilla sales
(Burritos, Wraps, Frozen Entrees)

Fails to capture many large segments



More about tracking

- **US Dept Of Commerce assigns NAICS code 311830 to tortillas**
- **Several major players are conglomerates, so under other codes**
- **Majority of tortilla sales not seen by IRI (no bar-codes on them)**
- **Significant portion of tortillas are part of other products**
- **Traditional preference for fresh-onsite tortillas makes Tortillas manufactured in restaurants un-trackable**



Missed segments

Fast food chains

Taco Bell, McDonalds, Chipotle, etc.





Missed segments

- **Non-Commercial & institutional consumption**
 - Hospitals
 - Military
 - Schools
 - Prisons

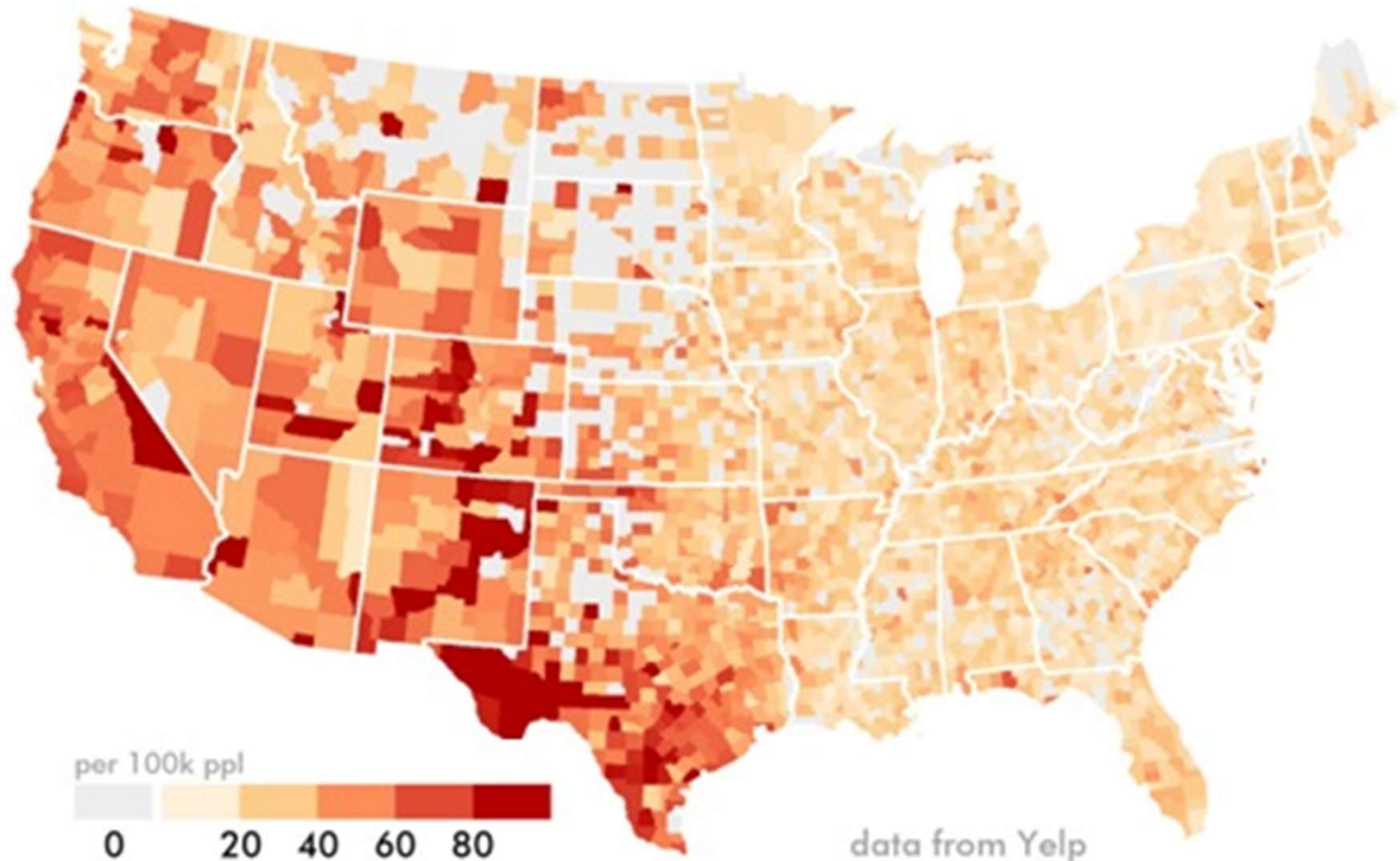




Missed segments

Mexican restaurants

58,000 in the US





Missed segments

Mexican Grocery Stores

28,000 in the US



www.alamy.com - E5WCA2



TIA Data aggregates all segments



Key Points

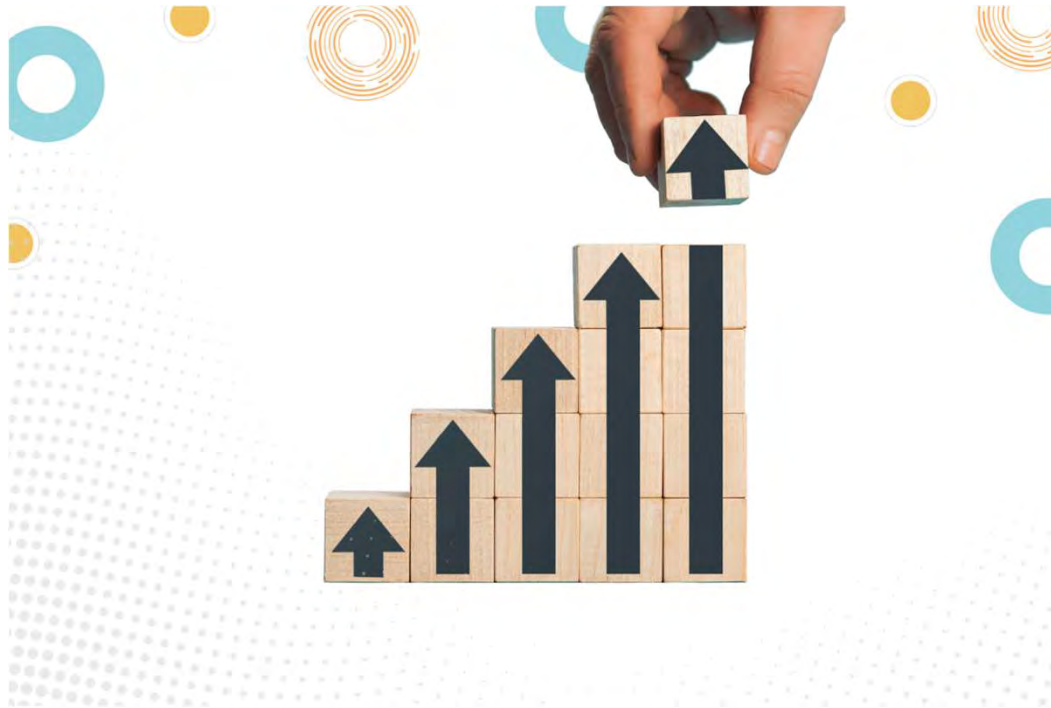


- **\$39 Billion USD worldwide in 2025**
 - \$26 Billion “total” in USA for 2025
 - \$16 Billion in “scannable” sales only
- **\$57 Billion USD worldwide by 2030**
 - \$34 Billion USD in USA by 2030
- **Anything Thst Starts as a Tortilla**
 - Soft Tortillas, Chips, Tacos, etc
- **CAGR 5.2% for Soft Tortillas / 8.8% Chips**



Market Drivers:

- * Demographic
- * Non-Demographic

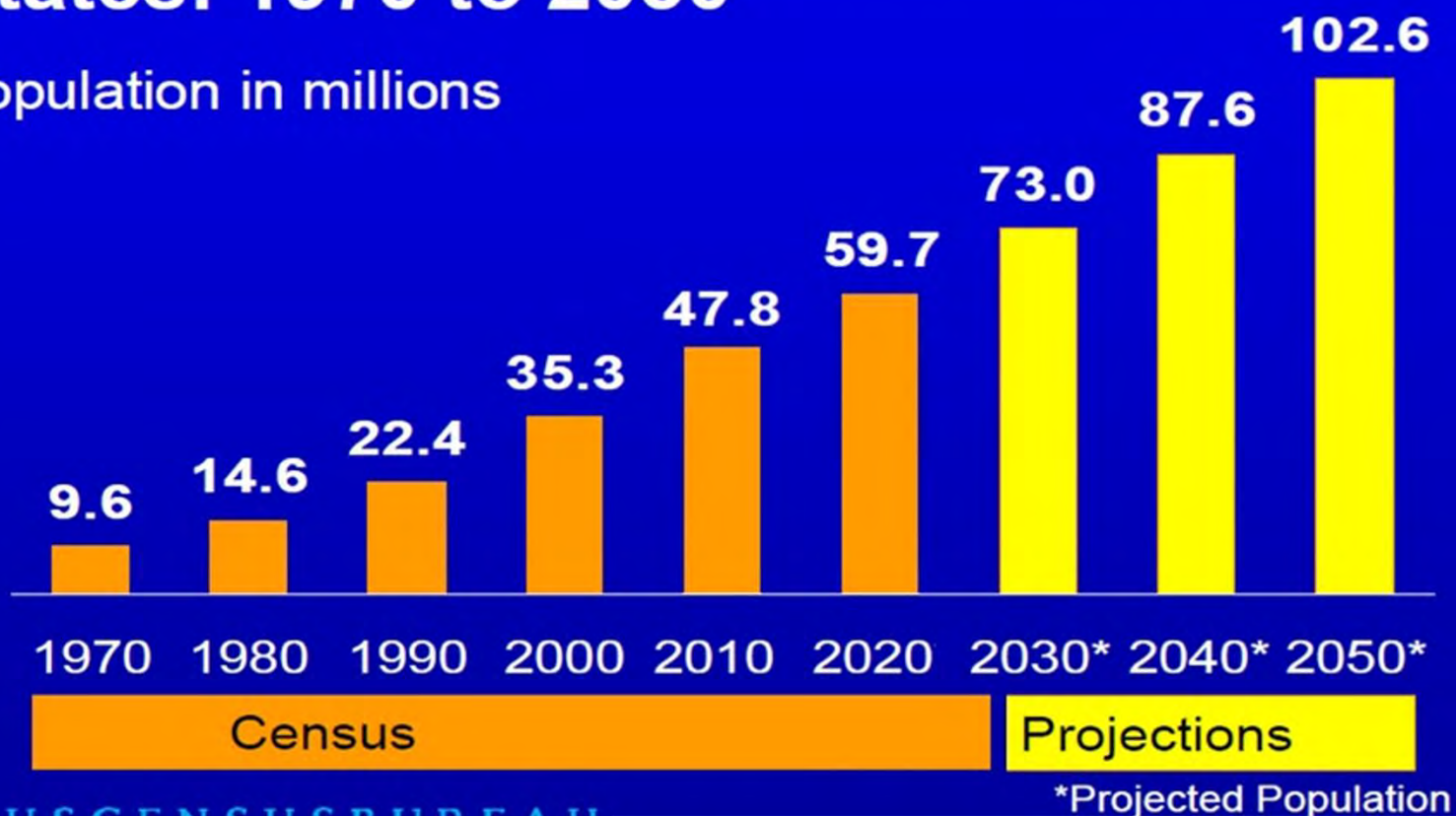




Demographics Driving U.S. Tortilla Sales

Hispanic Population in the United States: 1970 to 2050

Population in millions



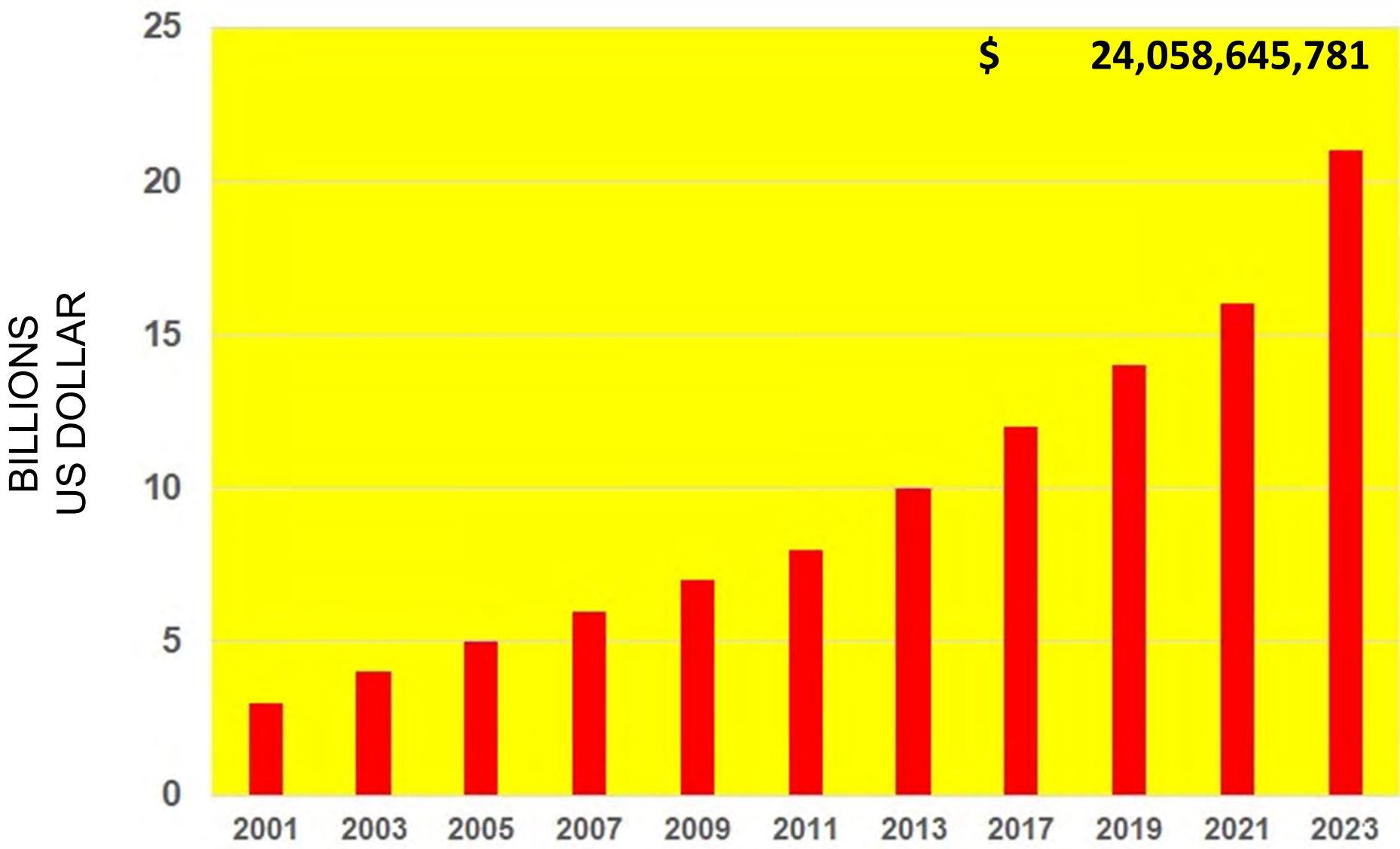
U.S. CENSUS BUREAU

*Projected Population

Source: U.S. Census Bureau, 1970, 1980, 1990, and 2000 Decennial Censuses; Population Projections, July 1, 2010 to July 1, 2050



2023 TOTAL Tortilla Market Size US





Non-Demographic

- Emphasis on Healthier Eating
On-going & Growing trend, Plus MAHA etc Lately
- Greater Curiosity about Culinary Diversity
- Availability of Dietary Options – E.G:
 - Kosher
 - Gluten Free
 - Organic
- Wider Availability Of Dining Venues
 - Explosion of Mexican Restaurants, Food Trucks



Non-Demographic

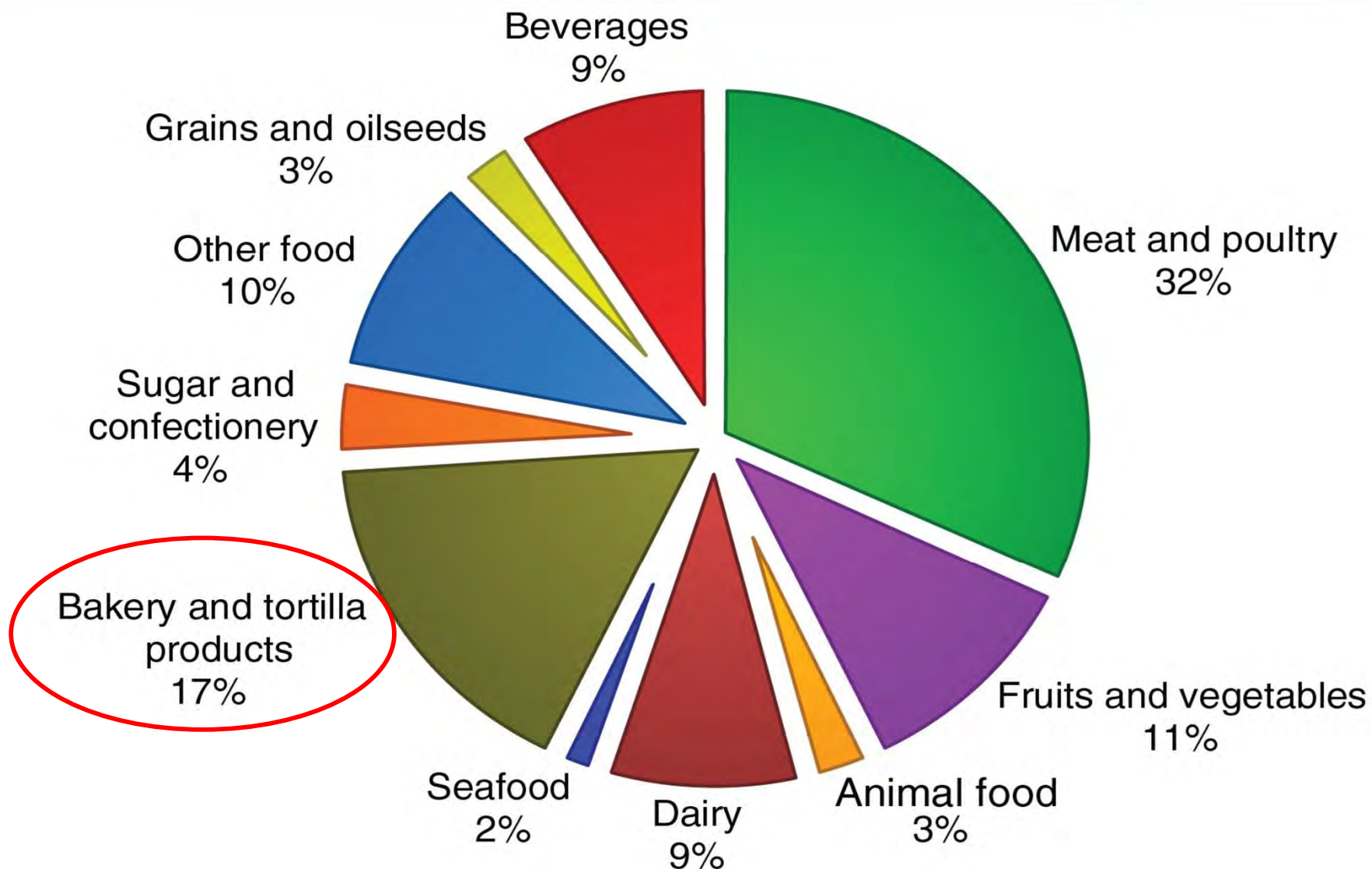
- Dietary Diversification among All Ethnic Groups
- Economics (value priced food product)
- Salsa Outsold Ketchup in 2010
- Tortillas Outsold White Sandwich Bread in 2015



Tortillas create jobs

Food and beverage manufacturing employees, by industry

Source: USDA,





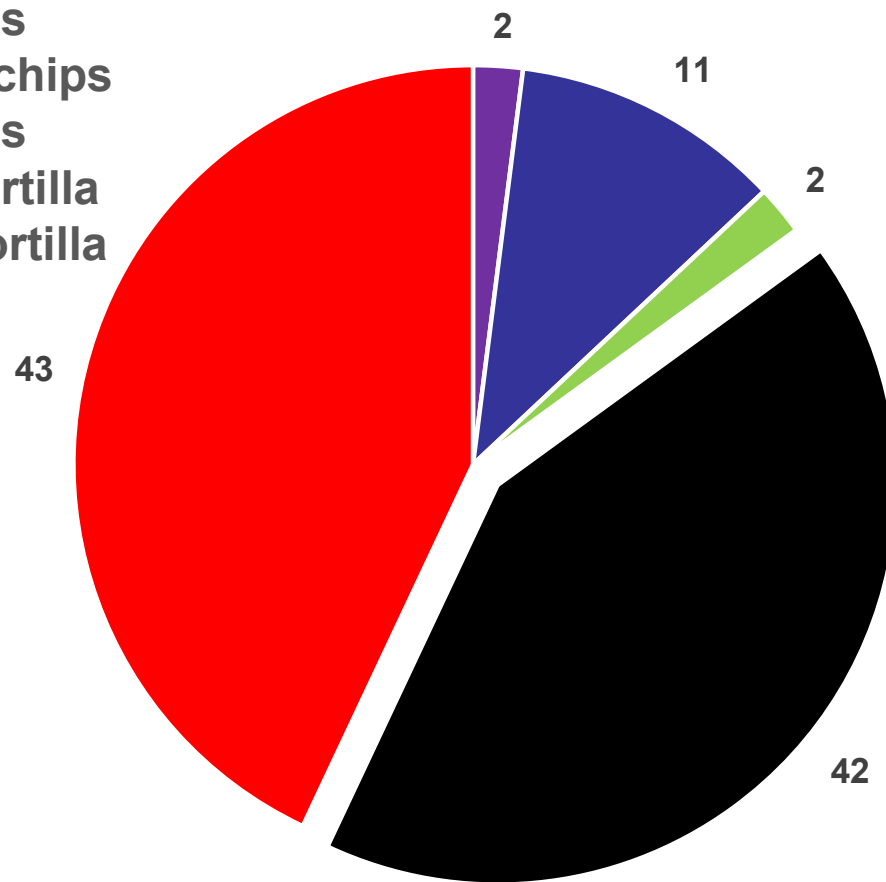
GLOBAL OVERVIEW





Soft Tortillas Vs. Derivatives (chips, tacos, tostadas)

- Tostadas
- Tortilla chips
- Tostadas
- Corn Tortilla
- Flour Tortilla



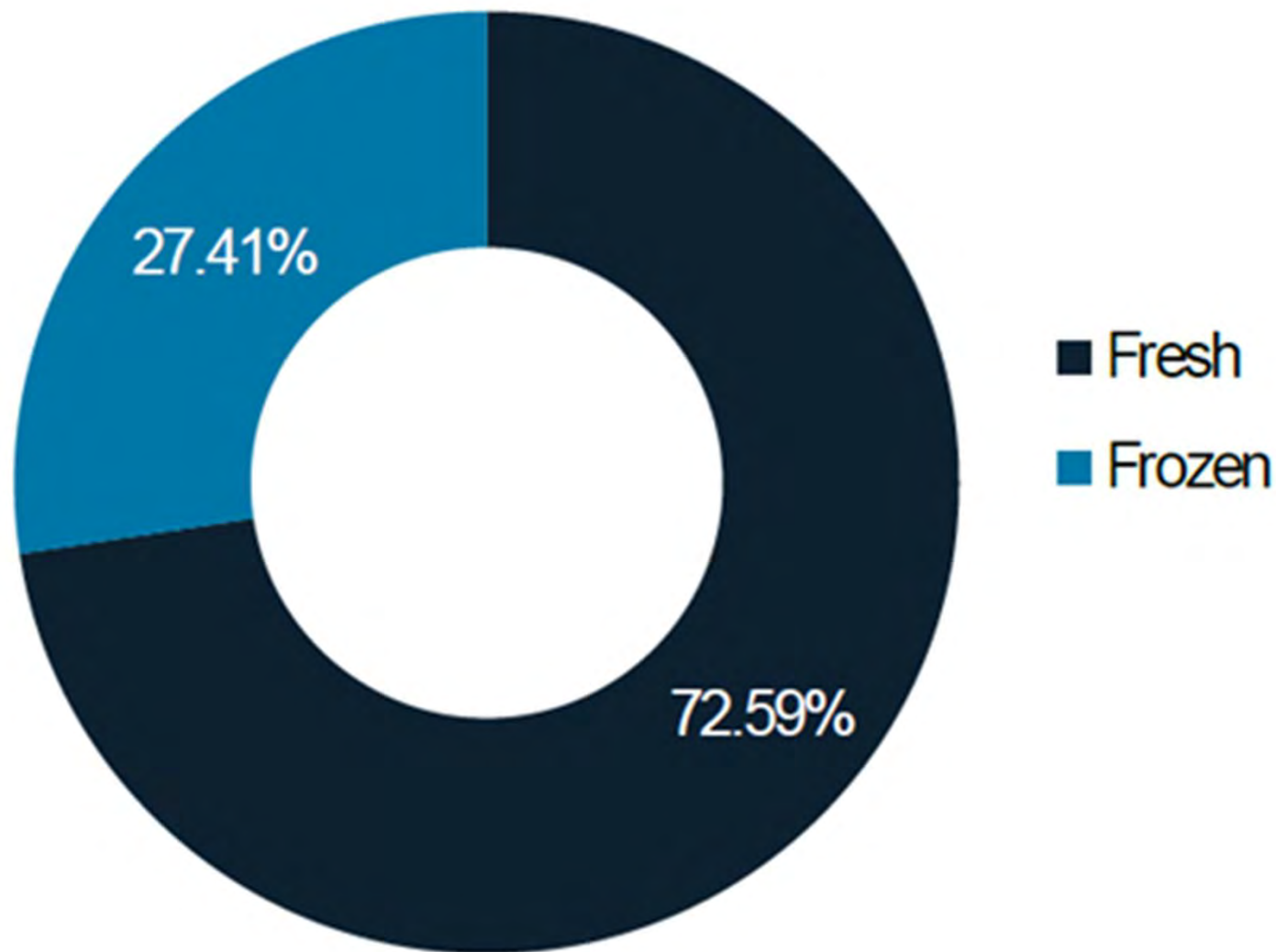


World tortilla market by processing type - \$USD

Processing Type	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Fresh	23,537.00	24,671.68	25,757.60	26,826.70	27,951.30	41,467.75	5.05%
Frozen	8,757.17	9,224.28	9,677.33	10,128.11	10,604.01	16,348.20	5.56%
Total	32,294.17	33,895.96	35,434.93	36,954.81	38,555.31	57,815.95	5.20%



World Tortilla Market By Processing Type - \$USD



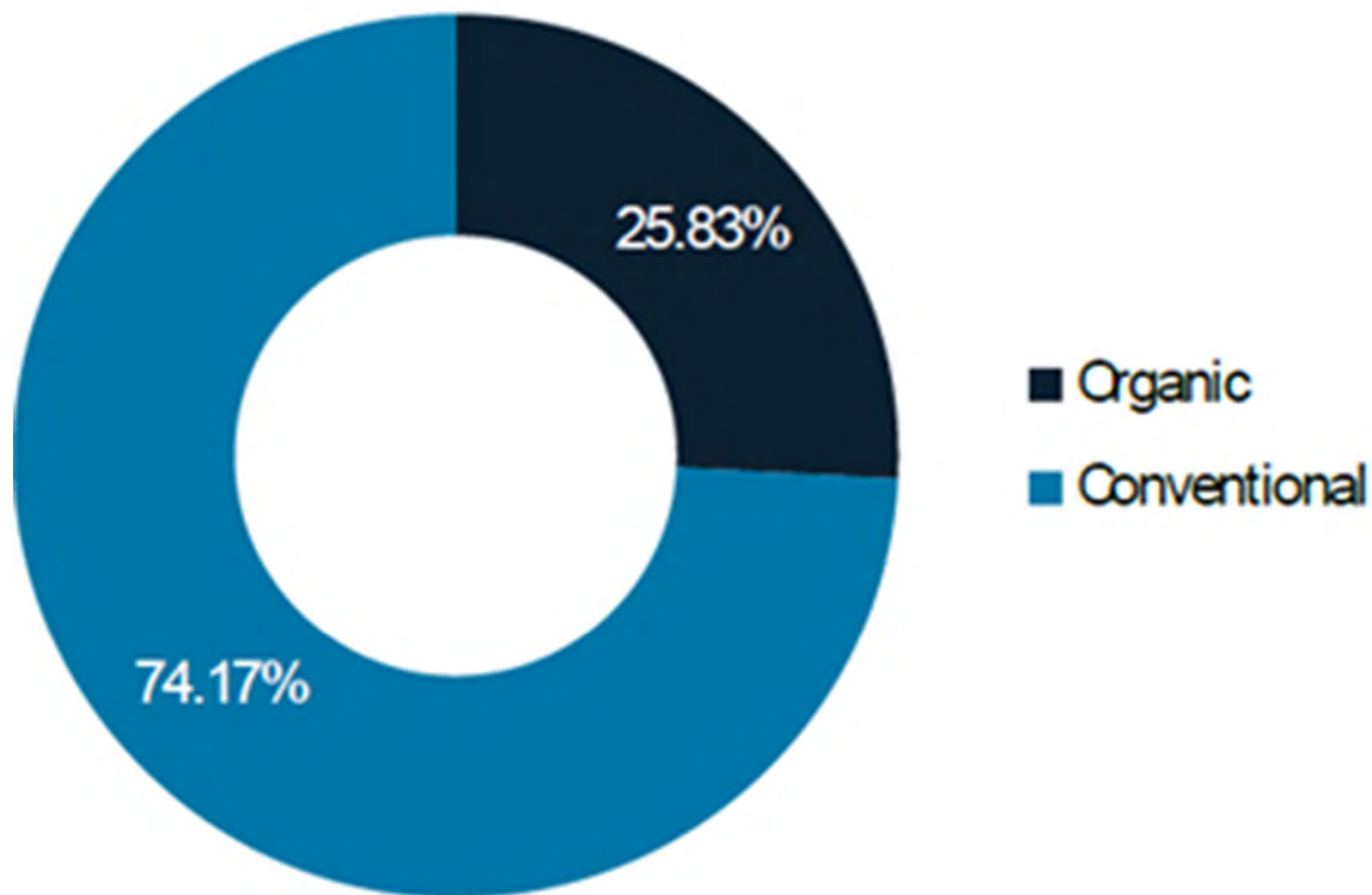


World Tortilla Market By Nature - \$USD

Nature	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Organic	8,052.26	8,552.55	9,046.36	9,544.42	10,072.62	16,483.20	6.35%
Conventional	24,241.91	25,343.41	26,388.57	27,410.39	28,482.69	41,332.75	4.76%
Total	32,294.17	33,895.96	35,434.93	36,954.81	38,555.31	57,815.95	5.20%



World Tortilla Market By Nature - \$USD



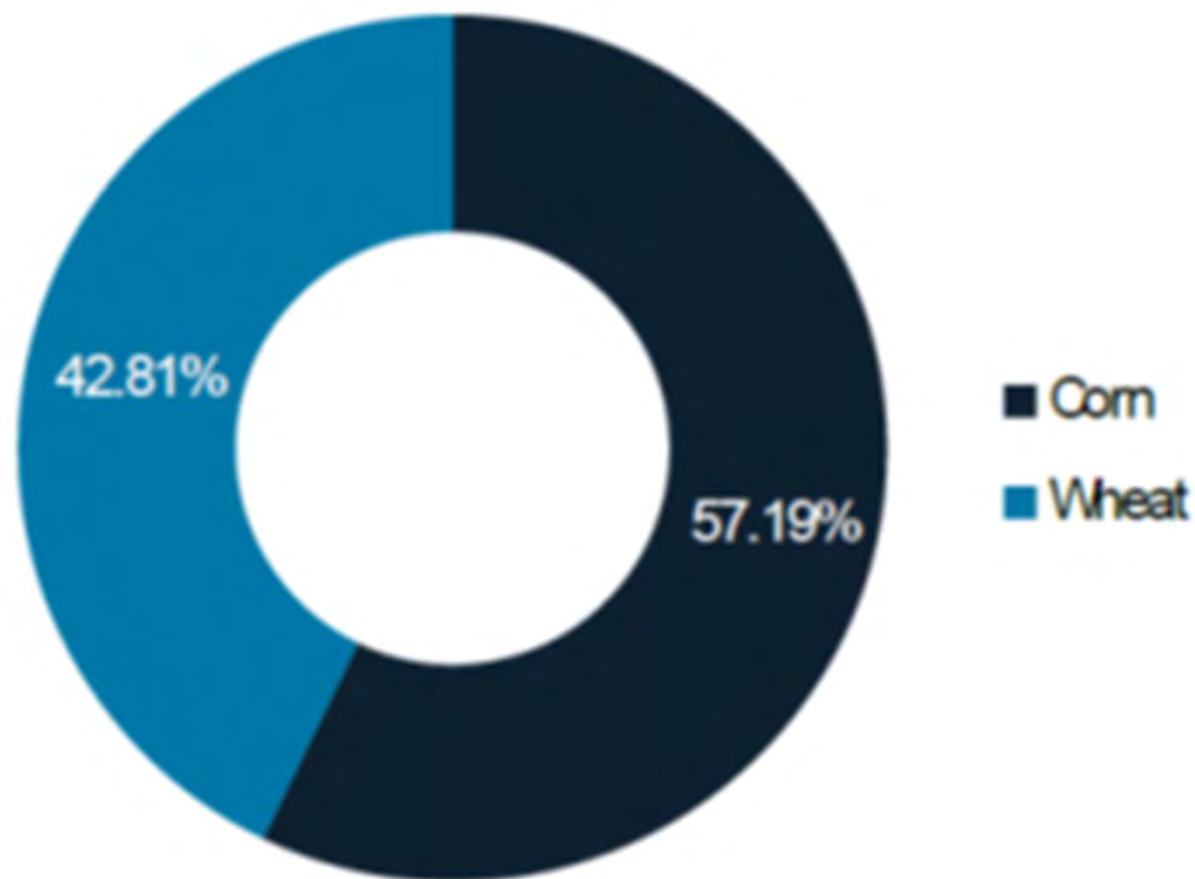


World Tortilla Market By Source - \$USD

Source	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Corn	18,407.57	19,352.59	20,264.70	21,168.77	22,121.97	33,609.59	5.37%
Wheat	13,886.59	14,543.37	15,170.23	15,786.04	16,433.33	24,206.36	4.96%
Total	32,294.17	33,895.96	35,434.93	36,954.81	38,555.31	57,815.95	5.20%



World Tortilla Market By Source - \$USD



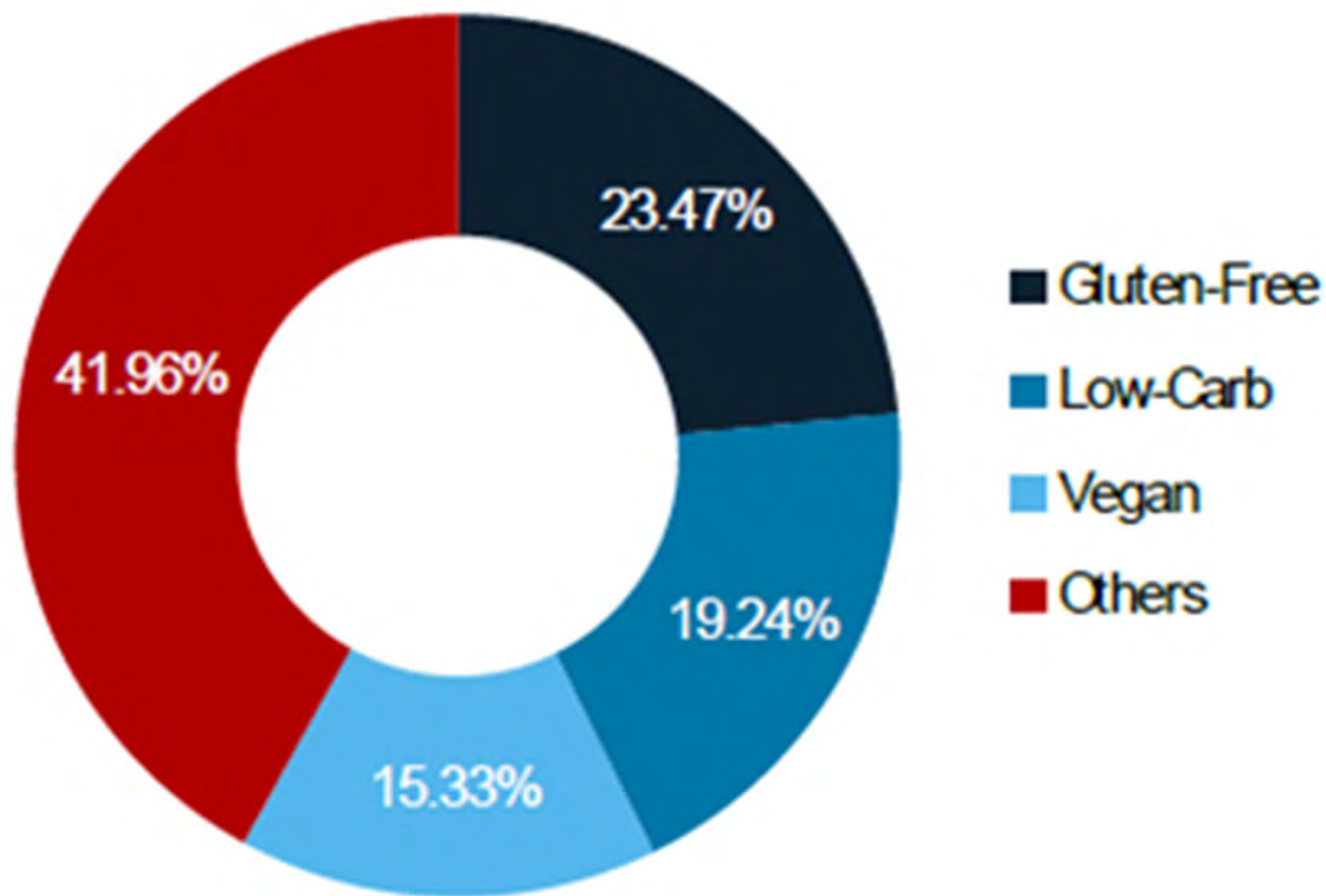


World Tortilla Market By Category - \$USD

Category	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Gluten-Free	7,500.37	7,900.25	8,288.07	8,673.94	9,081.30	13,998.04	5.56%
Low-Carb	6,170.95	6,492.41	6,803.27	7,111.85	7,437.36	11,362.71	5.44%
Vegan	4,849.87	5,125.42	5,394.70	5,664.24	5,949.36	9,398.95	5.88%
Others	13,772.97	14,377.88	14,948.89	15,504.78	16,087.30	23,056.26	4.60%
Total	32,294.17	33,895.96	35,434.93	36,954.81	38,555.31	57,815.95	5.20%



World Tortilla Market By Category - \$USD



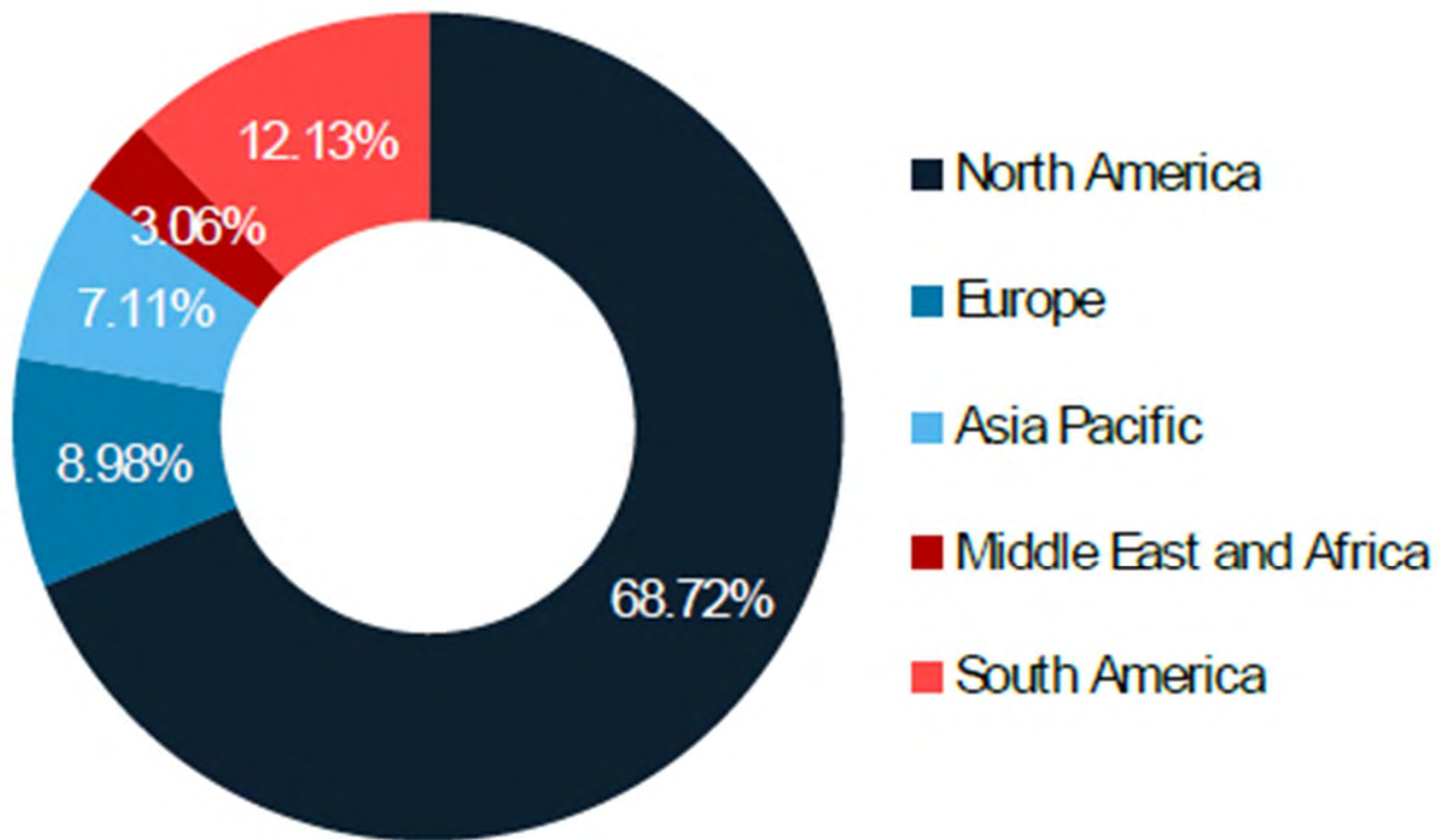


World Tortilla Market By Region - \$USD

Region	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
North America	22,372.48	23,418.96	24,416.18	25,394.55	26,422.50	38,759.82	4.91%
Europe	2,849.73	3,008.75	3,163.83	3,318.81	3,482.65	5,463.61	5.79%
Asia-Pacific	2,202.92	2,344.63	2,485.00	2,626.96	2,777.63	4,607.93	6.53%
Middle East & Africa	982.67	1,033.58	1,082.79	1,131.61	1,183.10	1,803.86	5.41%
South America	3,886.37	4,090.03	4,287.12	4,482.88	4,689.43	7,180.74	5.47%
Total	32,294.17	33,895.96	35,434.93	36,954.81	38,555.31	57,815.95	5.20%



World By Region - \$USD





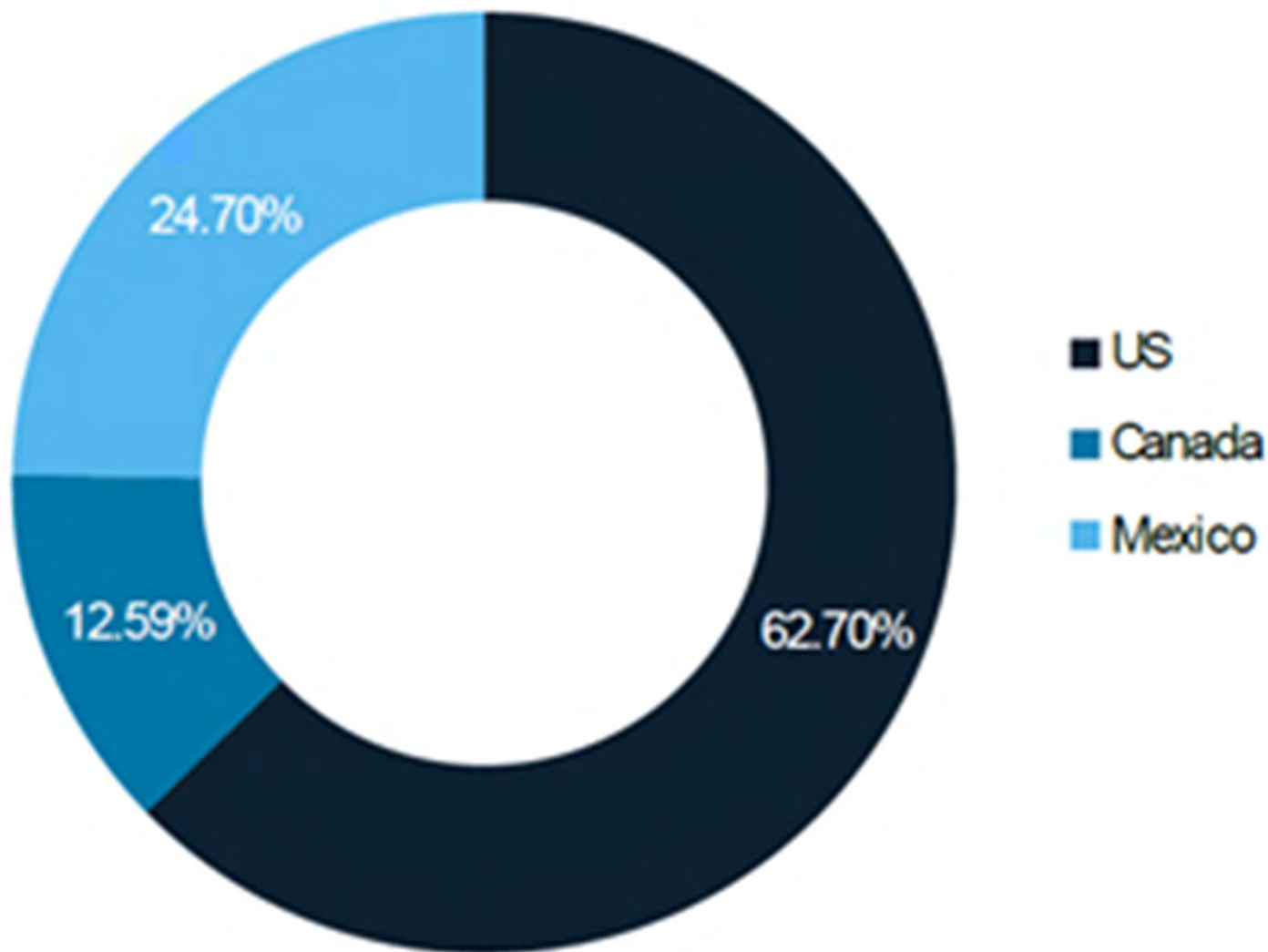
NORTH AMERICA



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North America Tortilla Market By Country - \$USD





All North America Tortilla Market

By Nature - \$USD

Nature	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Organic	5,551.12	5,880.07	6,202.70	6,526.40	6,868.80	10,994.59	6.06%
Conventional	16,821.35	17,538.89	18,213.49	18,868.15	19,553.71	27,765.23	4.48%
Total	22,372.48	23,418.96	24,416.18	25,394.55	26,422.50	38,759.82	4.91%



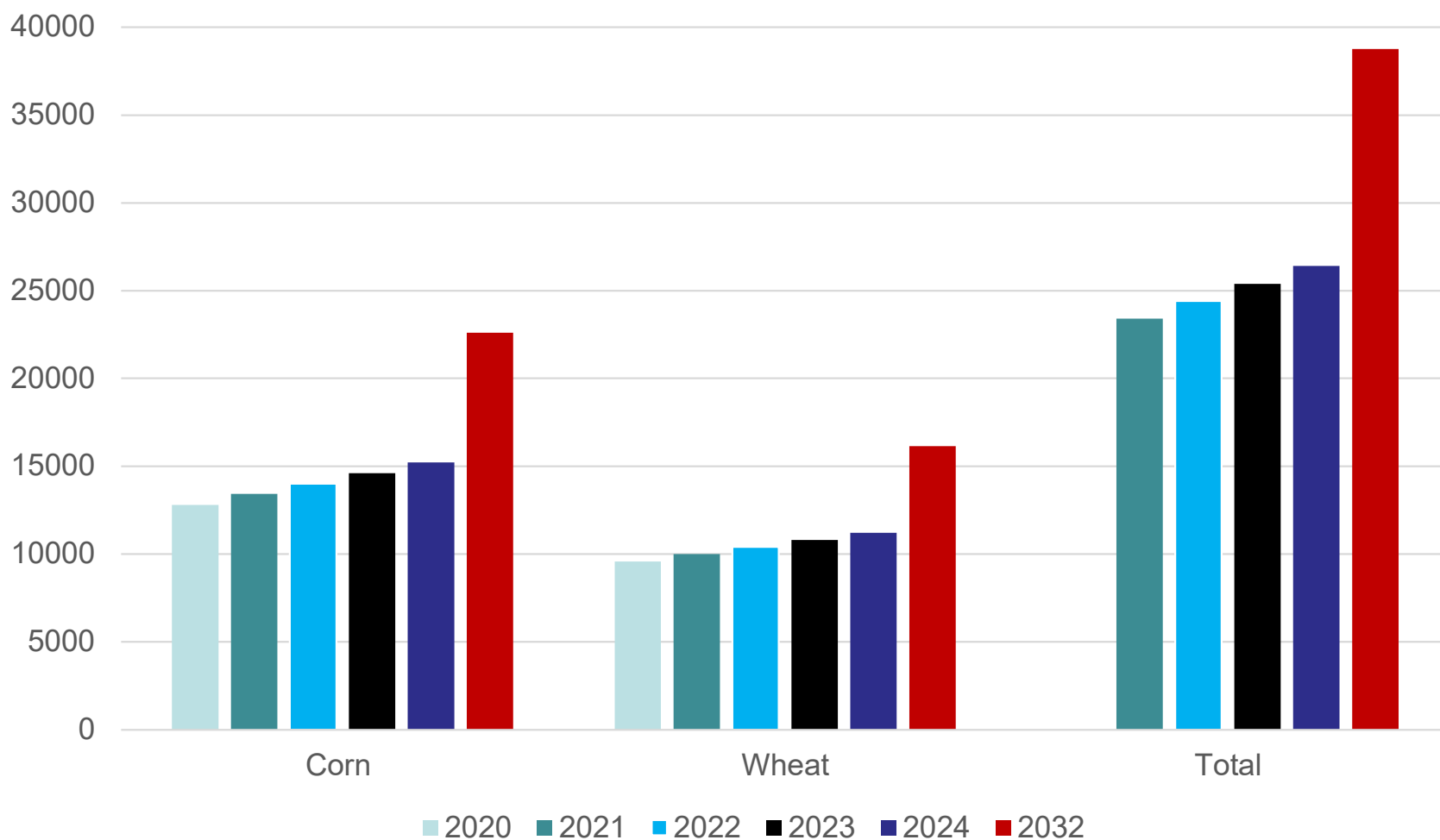
All North America Tortilla Market

By Source - \$USD

Source	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Corn	12,797.98	13,419.03	14,013.80	14,599.64	15,215.91	22,617.37	5.08%
Wheat	9,574.49	9,999.94	10,402.39	10,794.91	11,206.60	16,142.45	4.67%
Total	22,372.48	23,418.96	24,416.18	25,394.55	26,422.50	38,759.82	4.91%



All North America Tortilla Market By Source - \$USD





All North America Tortilla Market

By Category - \$USD

Category	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Gluten-Free	5,203.81	5,466.74	5,719.87	5,970.24	6,233.94	9,403.47	5.27%
Low-Carb	4,307.94	4,520.15	4,723.78	4,924.67	5,136.09	7,675.82	5.15%
Vegan	3,368.90	3,550.75	3,727.25	3,902.91	4,088.27	6,318.53	5.59%
Others	9,491.83	9,881.32	10,245.28	10,596.73	10,964.19	15,362.00	4.31%
Total	22,372.48	23,418.96	24,416.18	25,394.55	26,422.50	38,759.82	4.91%

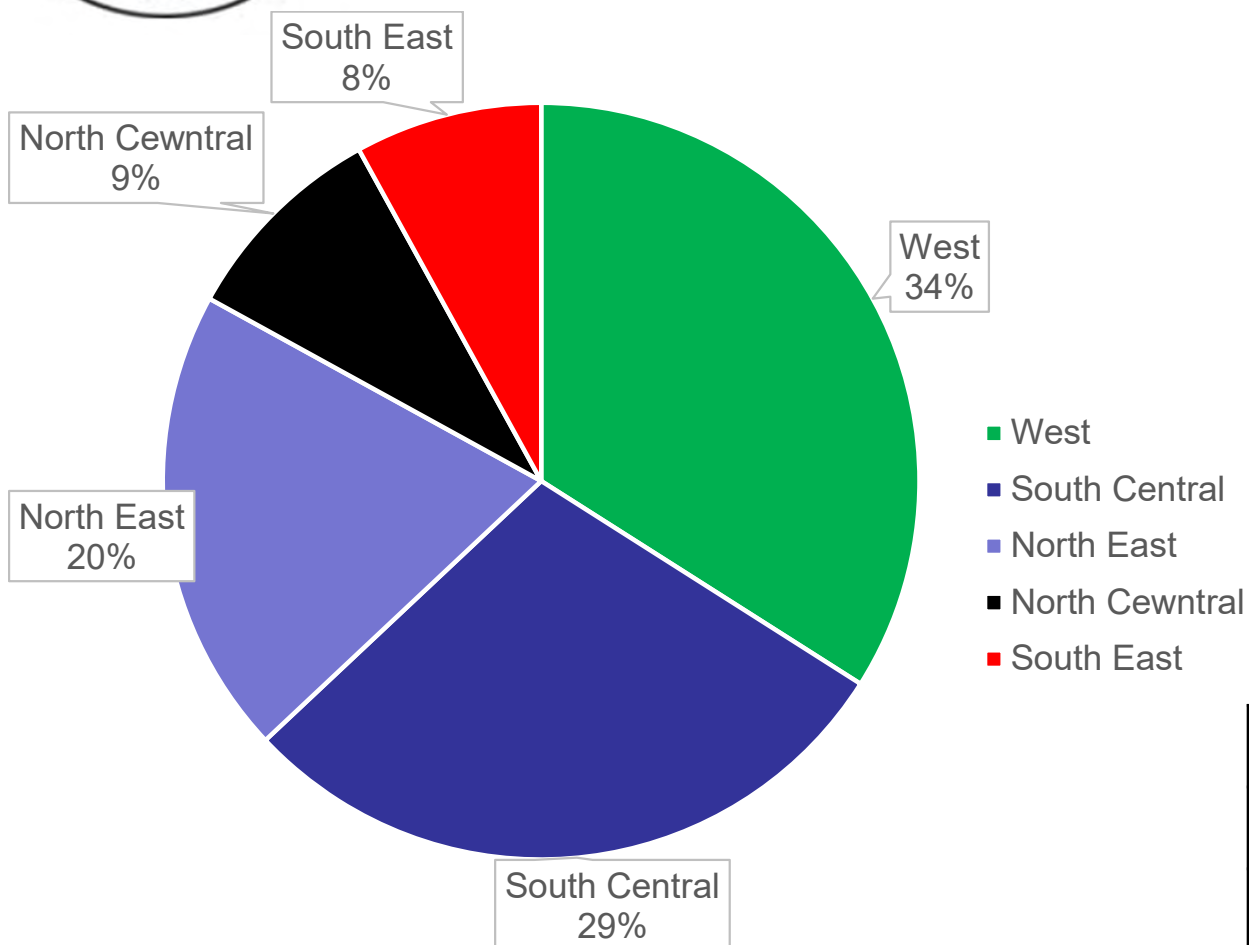


US Tortilla Market By Processing Type in \$USD

Processing Type	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Fresh	10,224.50	10,665.72	11,081.34	11,485.34	11,908.68	16,984.82	4.54%
Frozen	3,891.89	4,080.19	4,260.40	4,437.77	4,624.26	6,860.22	5.05%
Total	14,116.39	14,745.92	15,341.74	15,923.11	16,532.94	23,845.04	4.68%



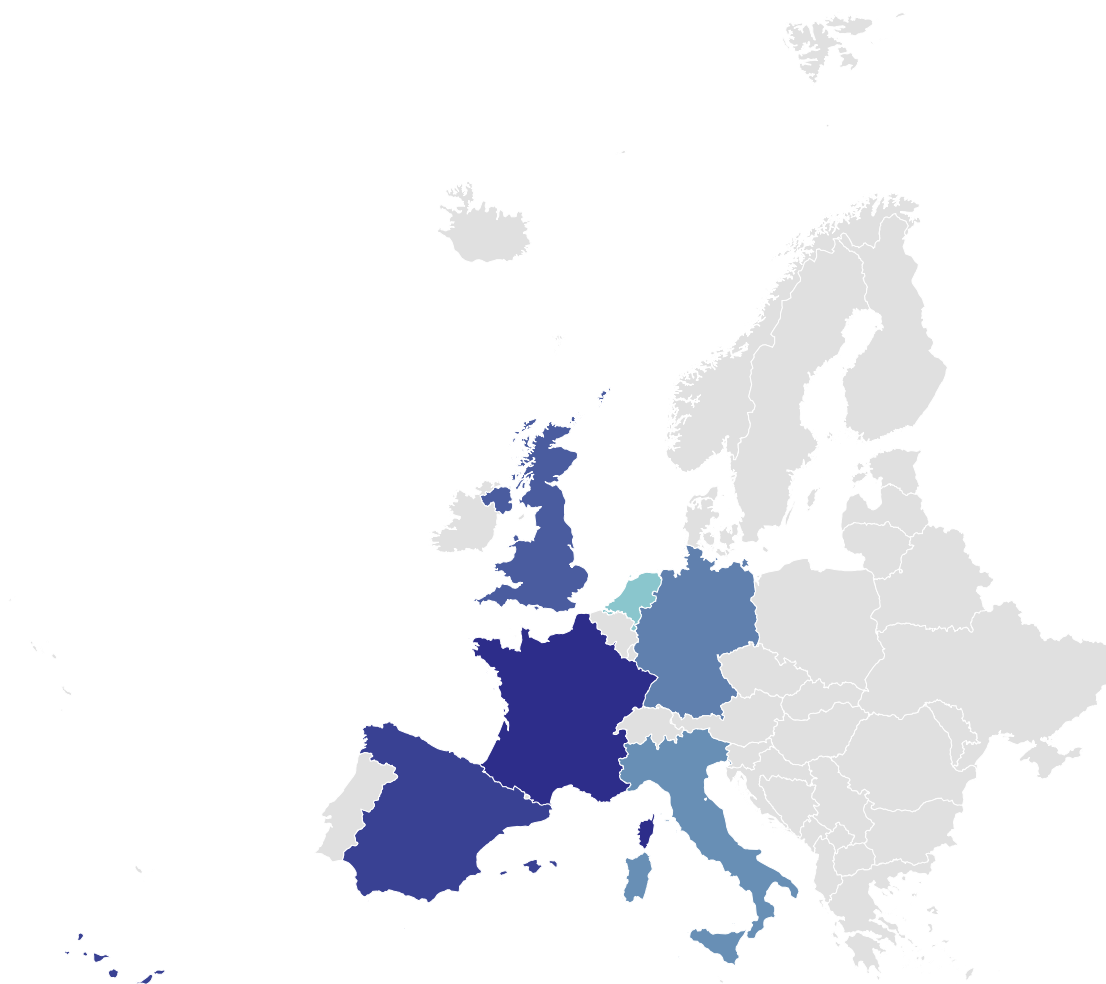
U.S Sales by Region \$USD



Region	%
West	34
South Central	29
North East	20
North Central	9
South East	8



Europe



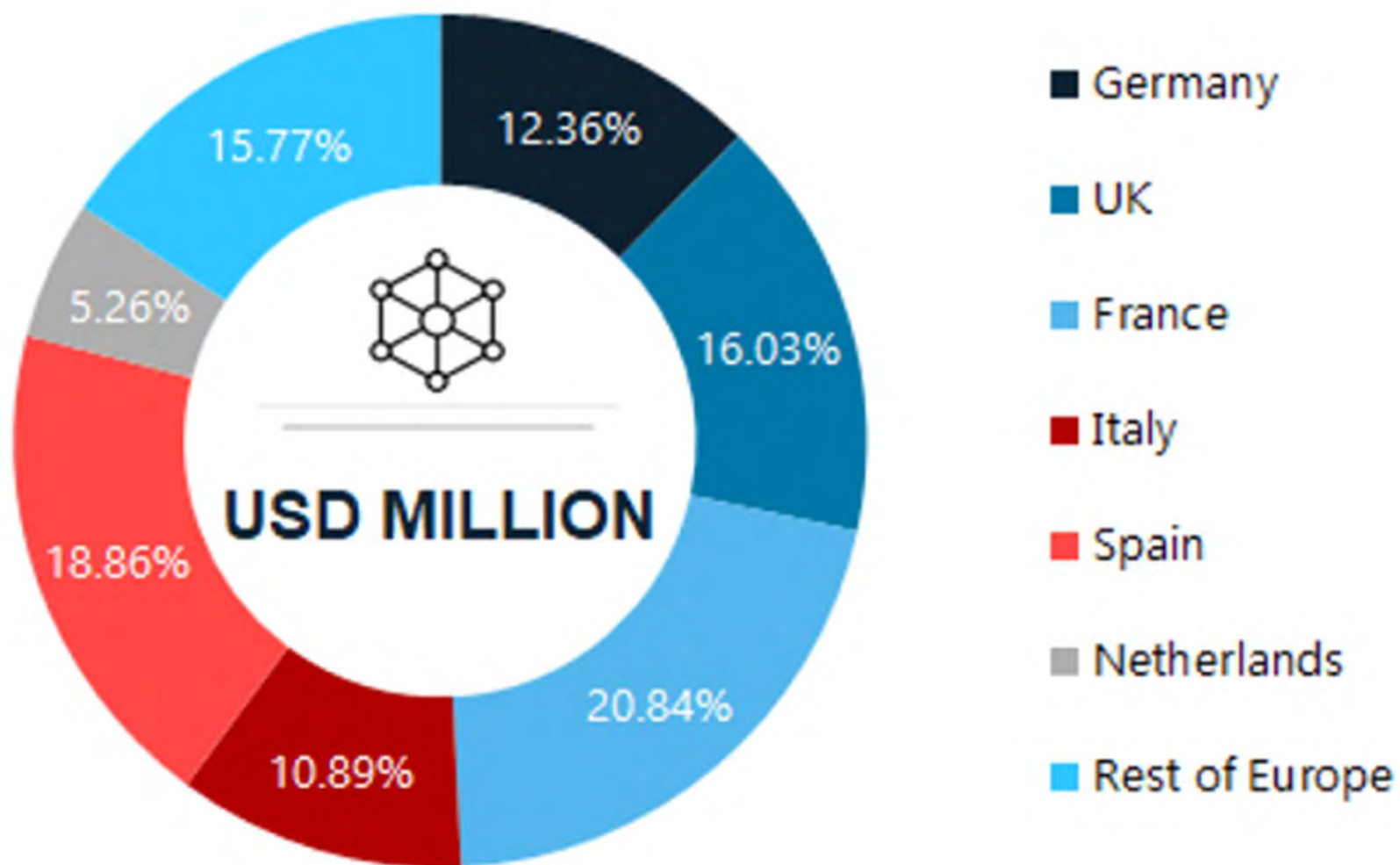


Europe Tortilla Market By Country in \$USD





Europe Tortilla Market By Country %





Europe Tortilla Market By Category in \$USD

Category	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Gluten-Free	645.27	683.68	721.45	759.44	799.72	1,289.56	6.15%
Low-Carb	553.54	585.84	617.52	649.32	683.01	1,091.99	6.04%
Vegan	425.53	452.38	478.96	505.84	534.40	883.46	6.49%
Others	1,225.39	1,286.85	1,345.91	1,404.20	1,465.52	2,198.60	5.20%
Total	2,849.73	3,008.75	3,163.83	3,318.81	3,482.65	5,463.61	5.79%



Europe Tortilla Market By Nature in \$USD

Nature	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Organic	723.31	772.71	822.04	872.28	925.80	1,583.69	6.94%
Conventional	2,126.42	2,236.04	2,341.79	2,446.53	2,556.85	3,879.92	5.35%
Total	2,849.73	3,008.75	3,163.83	3,318.81	3,482.65	5,463.61	5.79%



Europe Tortilla Market By Source in \$USD

Source	2020	2021	2022	2023	2024	2032	CAGR (2024-2032)
Corn	1,631.92	1,725.75	1,817.62	1,909.71	2,007.19	3,189.12	5.96%
Wheat	1,217.81	1,283.00	1,346.22	1,409.10	1,475.46	2,274.49	5.56%
Total	2,849.73	3,008.75	3,163.83	3,318.81	3,482.65	5,463.61	5.79%



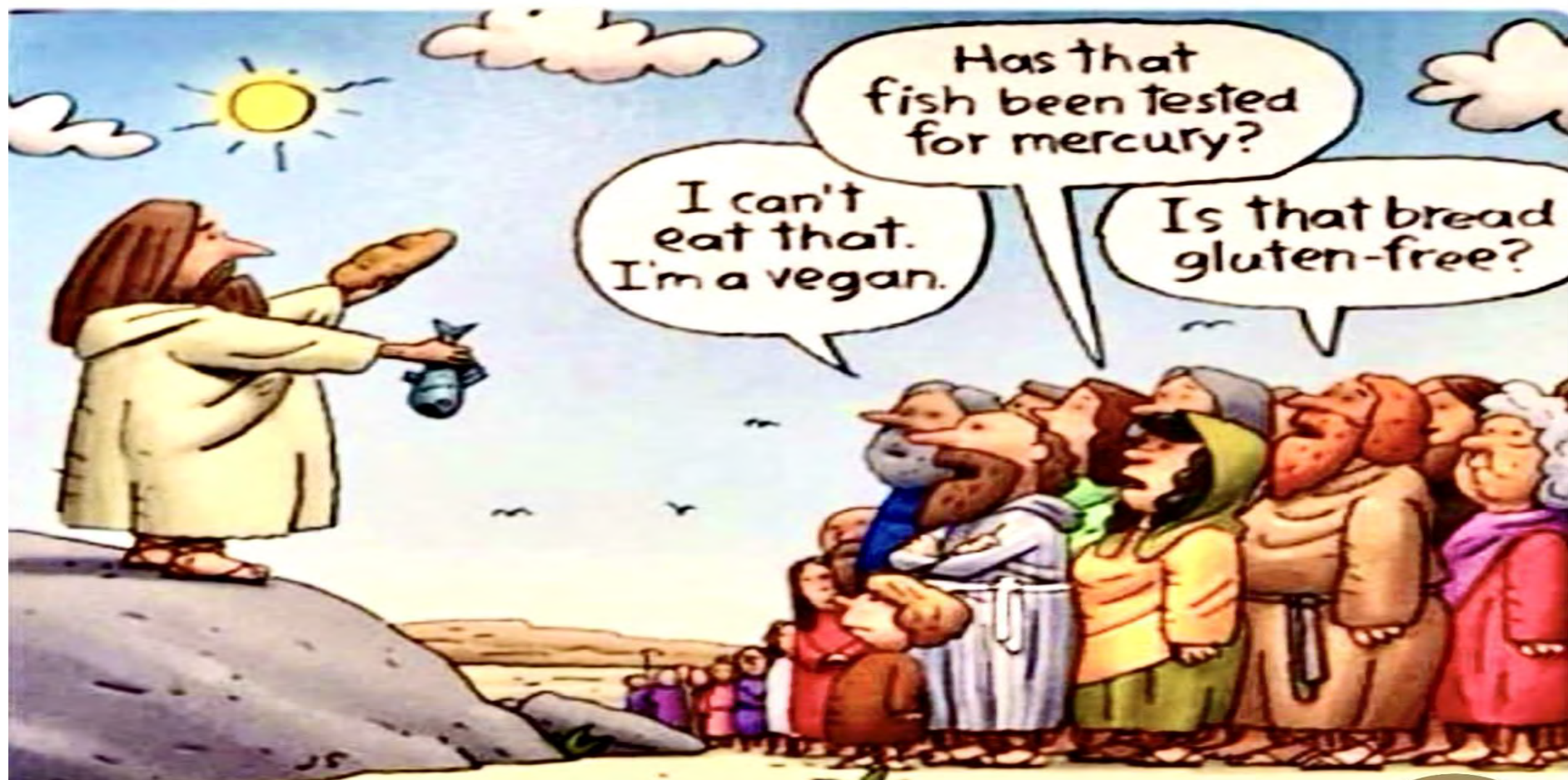
Resources for Market Engagement



Why TIA ?

Because our members face an increasingly demanding environment...

If Jesus tried to feed the 5000 today... 😊





TIA's Role In This Market

- Expanding your business
 - Increase visibility between members & market
- Growing your profits
 - Increase knowledge of best practices
- Increasing your success
 - Supporting, informing & advocating for our members
- Event design & agenda based on members input

“Effective participation in TIA is not just involvement, it’s a proven revenue-building strategy for both producers and suppliers in the baking industry.”



Our Events

TIA Europe, Nov 5-6
Barcelona, Spain
Attendees from 21 countries
Dinner & Tour at Camp Nou

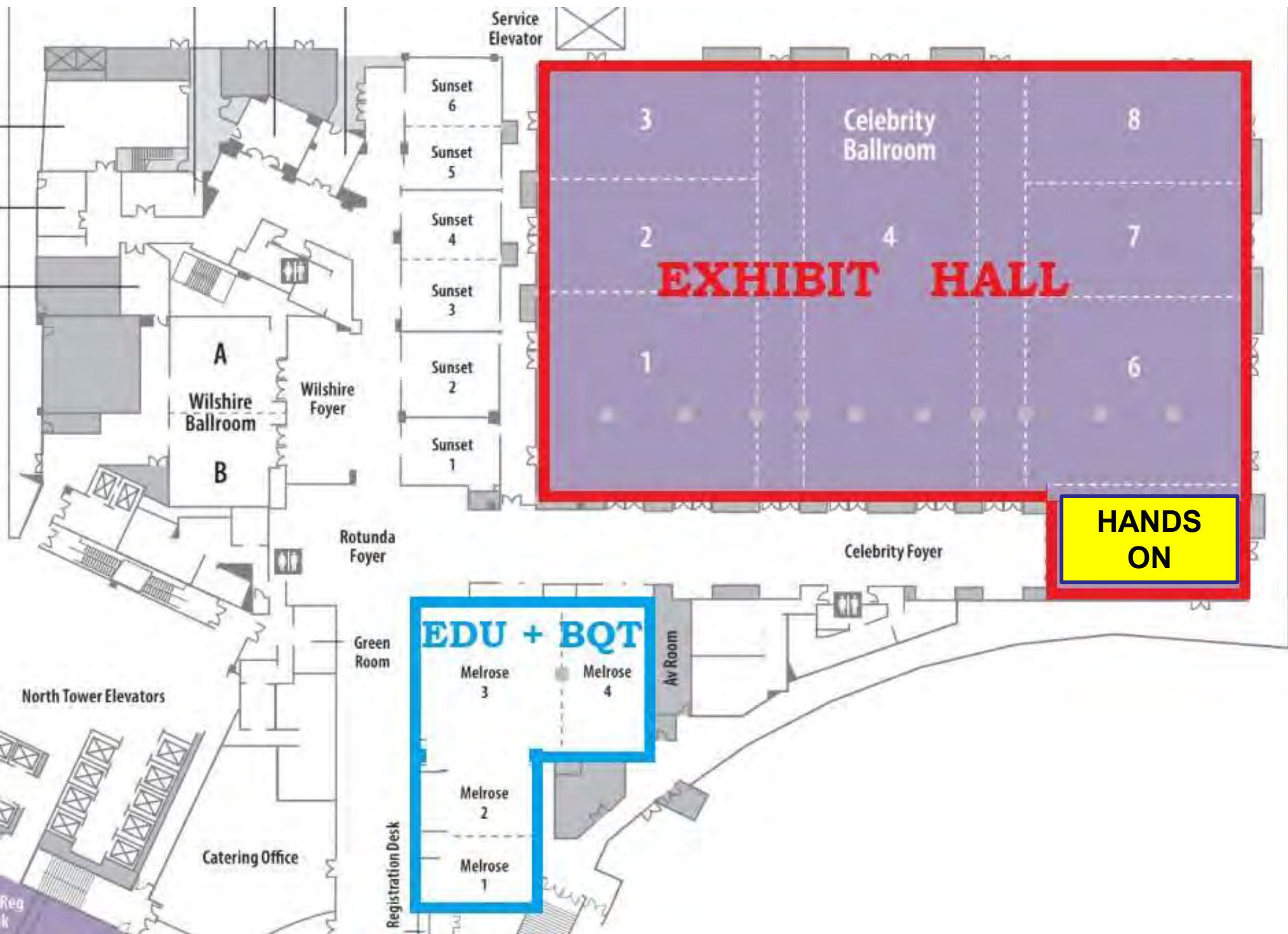


TIA Tech Conference
Sept 29-30 in Nashville
Featuring Factory Tours



TIA Annual Convention
May 26-27
Planet Hollywood Las Vegas







Increasing Opportunities



- **Buyer's Guide & Membership Directory**
- Print and online
- Reaches 8,000+
- Members get FREE listing and eligible to buy full page ads
- Sales Open NOW



Increasing Business Opportunities



- Business opportunity Alert E-Mails
- Promoting our industry
- No-cost mass media exposure opportunities



Member Communications

WWW.TORTILLA-INFO.COM

TIA News

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2011 Technical Seminar
Coming Soon: MAY 22nd – 23rd
"REGISTER NOW!"
Upgraded Location in Anaheim CA, With Sessions Plus Field trips to 3 Facilities

2011 TECHNICAL CONFERENCE

After shifting our Technical Conference last fall to co-locate with the triennial International Baking Industry Exposition 2010 in Las Vegas, NV, TIA is returning this event to its usual spring date. This year it will come to Southern California, at Disney's beautiful Grand Californian hotel.

day of factory tours and training sessions.

The first session runs from 9:15 to 11:15 a.m. and will be presented by Casa Herrera, Pomona, CA. Next, the group will visit a factory hosted by Lawrence Equipment from Noon to 2pm, where they will also be served lunch. The third tour with demos and training sessions of the afternoon runs from 2:45 to 4:45 and will be hosted by J.C. Ford Co., La Habra, CA where beer, snacks and refreshments will be offered.

TIA's Technical Conference focuses on the critical operational issues associated with tortilla and flatbread production and kicks off on Mon May 22nd with a full day of education sessions.

Topics to be presented that day include safe handling of ingredients, preparing for a third-party audits, commodity and ingredient pricing and cost trends, latest formulation, and improving supervisory skills. A working lunch will feature an "ask the experts" open panel, and at the conclusion of the educational sessions, a cocktail reception, featuring tabletop displays from suppliers to the industry, will be held from 5 to 7 p.m.

Then on Tuesday, May 24, conference attendees will board buses beginning at 8 a.m. for a full

2011 Spring

PUBLISHER:
Tortilla Industry Association
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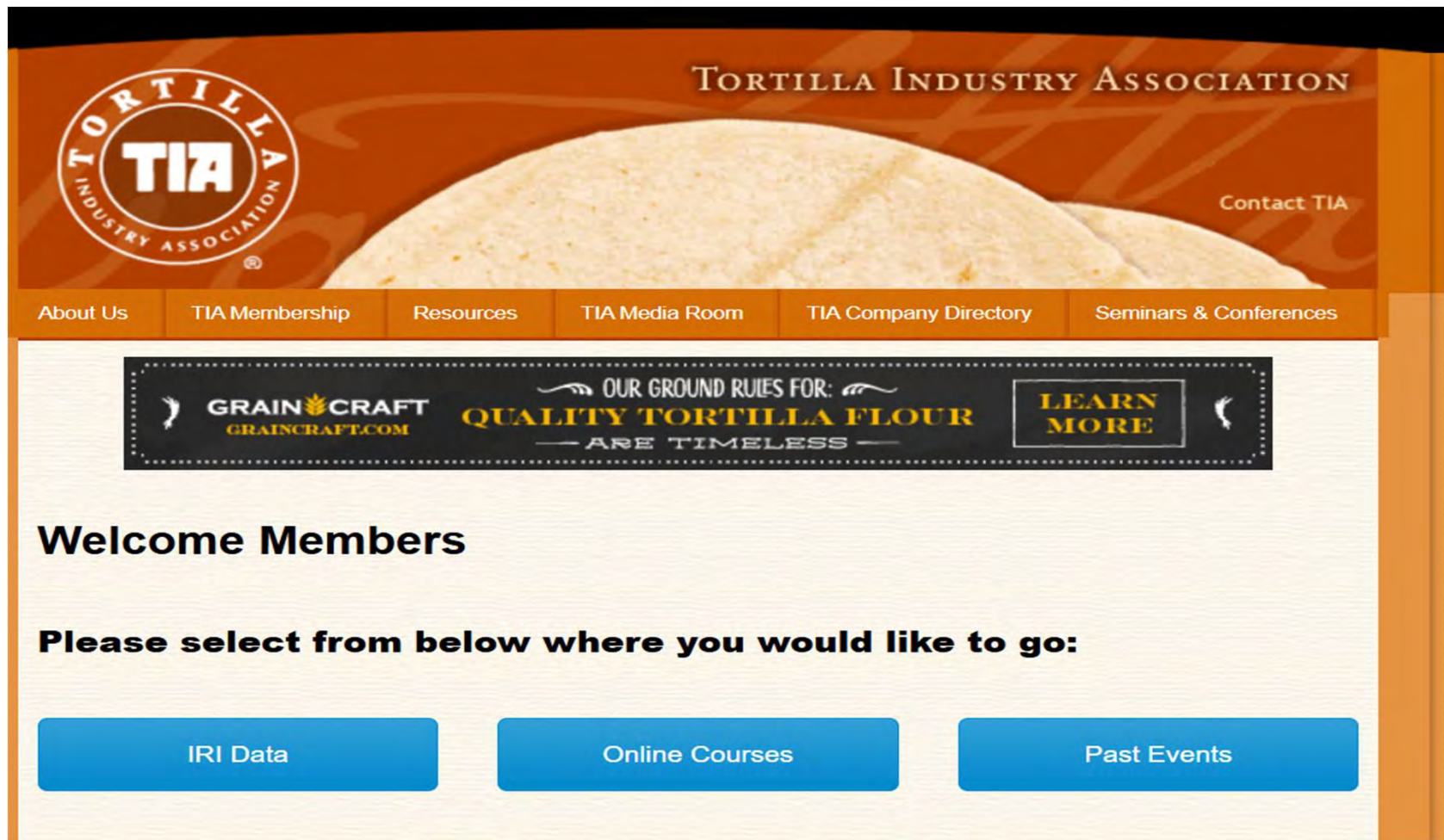
- Electronic Newsletter
 - Every Wednesday
 - Over 8,000 readers
- “Ask The Experts”
Members Only
Service
- Opportunity Alert
E-mail Blasts



2027 TIA Convention



“Members Only” PW=2025tortilla



- IRI / Circana Data
- On-Line Training Modules
- All Past Conference Presentations



SPEAKER INTROS